

Early Warning System

User Guide

Version 1.0

March 2010

Revision History

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January 2010	PROD 1.0	--	--

This material is intended to provide orientation and guidance to insurers accessing the Early Warning System (EWS) production system. Due to ongoing enhancements, the depictions of the online applications in this document may not be exact representations.

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1. INTRODUCTION

1.1. Overview of IBC's New Early Warning System

Insurance Bureau of Canada's (IBC's) new Early Warning System application provides reporting companies with information and tools to help them collaborate with IBC in resolving data issues related to the automobile data submissions. By using the application, your company will be able to monitor, analyze and resolve data issues in a timely manner thereby avoiding unnecessary deficiency fees.

The Early Warning System application includes access to EWS - Issue Management and EWS - Management and Status Reports modules.

EWS - Issue Management

- Displays all the data issues which have been analyzed and determined by the Data Quality Analyst to be a problem that the company needs to investigate.
- Displays detailed information regarding data issues, including the applicable province(s) and the reported batches related to the particular issue.
- Displays information on the Status of the issue and provides the capability to update the status and communicate with the IBC Data Quality Analyst regarding the issue.
- Provides the company with supporting files to help with their analysis in determining how to fix the data and resolve the issue.
- For more information, please see [EWS - ISSUE MANAGEMENT](#).

EWS - Management and Status Reports

- Provides the company with reports to monitor the responses to issues, including:
 1. Issue Volume Summary Report to monitor the volume of workload
 2. Issue Response Summary Report to monitor the response to issues, and
 3. Issue Escalation Summary Report to monitor escalation of unresolved issues.
- For more information, please see [EWS -MANAGEMENT AND STATUS REPORTS](#).

1.2. Getting Started

Browser Requirements

The Early Warning System application is available through IBC's Infosource Portal. To access IBC's Infosource Portal you must use a browser that supports 128-bit encryption.

The IBC Infosource Portal and the Early Warning System application are compatible with Microsoft Internet Explorer 7.0 and greater. Earlier versions of Explorer and other browsers are not supported.

Application Availability

The Early Warning System application is available 24 hours a day, 7 days a week. However, the system may occasionally be unavailable for very brief periods of time when IBC conducts routine maintenance and/or implements application enhancements.

Notification will be provided in advance.

Obtaining Access

Access to all IBC's web-based applications is managed through IBC's Member Services. This department is responsible for assigning and terminating user IDs, changing access privileges (such as giving users access to application modules and company information), resetting passwords, and providing and tracking access request forms to enable IBC to manage a user's profile.

IBC's Member Services can be reached by phone at 416-362-2031, ext 4605 or 1-800-761-6703, ext 4371 or by e-mail at memberservices@ibc.ca.

Logging In

You can access the Early Warning System application via Insurance Bureau of Canada's (IBC's) Infosource Portal at www.portal.abc.ca. This URL will bring you to the Portal log-in screen. Log in to the Portal by entering the user ID and password provided by IBC, and click on the LOG ON button. The first time you log in, you will be prompted to change the password given to you by IBC.

New passwords must:

- Have a minimum of 7 and a maximum of 32 characters
- Contain characters from three of the following four groups:
 - uppercase letters (A, B, C...)
 - lowercase letters (a, b, c...)
 - numerals (1, 2, 3...)
 - symbols (! @, #, \$, %, etc.)
- Not be the same as your five previous passwords
- Not contain your name, user ID, or either of these spelled backwards

Users will be locked out after attempting to log in three consecutive times with incorrect username/password combinations.

March 8, 2010 Contact Us

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Infosource Portal
The tools of the trade

Please note: This is the Site for the Automobile Submission Management Application. This is not the Infosource information resource site. Soon, a number of IBC's Web tools, including this system, will be integrated within a new Infosource portal.

Portal Applications
Select Portal Application:

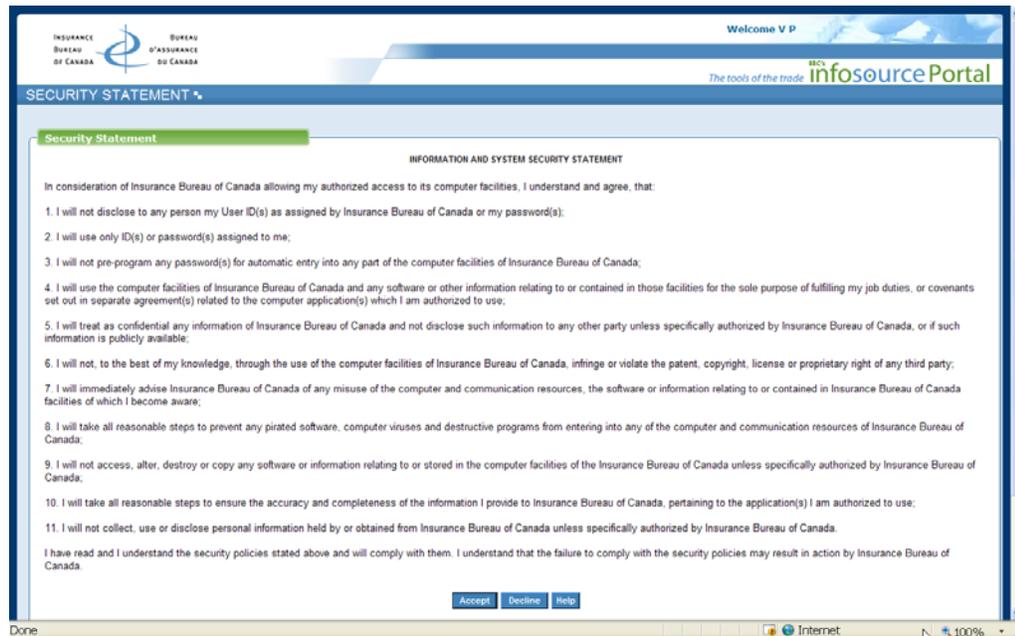
IBC Applications
MVR Service [Ontario]
Uninsured Vehicles (UV) Services [Ontario]
Vehicle Information Products and Services

Quick Links
Data Quality Management
IBC.ca

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Infosource Portal Log-in Screen

The first time you log in, you will be presented with IBC's Security Statement. Please read it carefully and click on the ACCEPT button to access the application.



IBC Security Statement

2. EWS – ISSUE MANAGEMENT

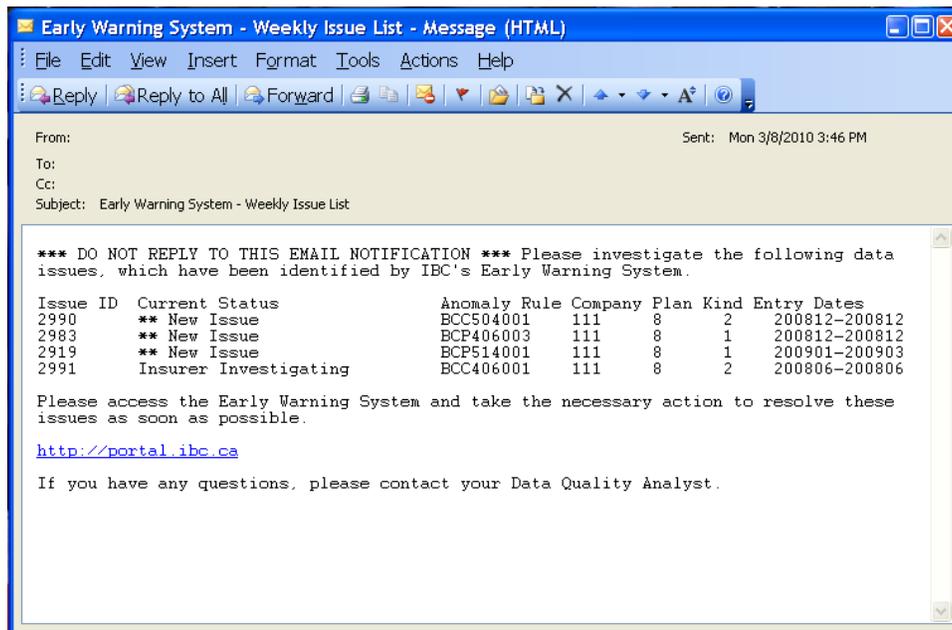
EWS – Issue Management Overview

The Issue Management module allows reporting companies to view the details and communicate with IBC on the data issues that have been identified by IBC's Early Warning System. The Early Warning System (EWS) automates the verification of data accuracy and reasonability, in order to proactively identify issues in the reported Plan 8 (Automobile) and Plan 9 (Facility Association) data.

IBC first investigates the data issues that are detected by the Early Warning System and will communicate with the reporting company if further investigation is required.

The data issues are communicated through a weekly email notification, called the Weekly Issue List, which will be sent to the designated EWS Company Issue Coordinator. The Weekly Issue List will contain all new data issues that have been detected, as well as any existing data issues that are awaiting a response.

Log in to the EWS application in order to track and respond to the data issues.



Weekly Issue List – Email Notification

To obtain access to the EWS – Issue Management module, please see [Obtaining Access](#).

2.1. Search Issues Process

After successfully logging into IBC's Infosource Portal, you can access the Issue Management module via the Main Menu. Once you select Search Issue within Issue Management, the Search Issue screen will be displayed.

In order to respond to data issues using Issue Management, you must follow the steps below. All data communication is completely secure; only authorized insurer personnel can access data and information belonging to their particular companies.

1. Enter the criteria you wish to search for in the Search Issues screen. For more information, please see section [2.2. Entering Search Criteria](#).
2. View the search results and select an issue from the results list. For more information, please see section [2.3. Viewing and Selecting from Search Results](#).
3. View the issue details and update the status of the issue to "Insurer Investigating". The change to the issue status will indicate that investigation of the data issue is underway. For more information, please see section [2.4 Viewing Issue Details](#).
4. Using the provided details, determine the source of the data issue within your systems.
5. Return to the EWS – Issue Management application and update the issue with the results of your investigation. There are three possible statuses available (please see [APPENDIX A – Issue Status Descriptions](#) for the complete list):
 - i. **Issue Confirmed – To Be Fixed**
Apply this status when the investigation into the data issue uncovered a system problem that will be fixed and the ASP data will be resubmitted. Once this status is set, IBC will monitor to ensure the timely receipt of the data resubmission. Use the reversal option to request the reversal of the existing batches when the data resubmission is ready (please see [Batches Involved Tab](#) for further information on requesting a reversal).
 - ii. **Issue Denied – Reflects Business**
Set this status when the investigation into the data issue determined that the data does in fact reflect your business and provide a detailed

explanation in the comments box. Once this status is set, IBC will review the details and will confirm or reject the status/explanation.

iii. **Issue Confirmed - Irresolvable**

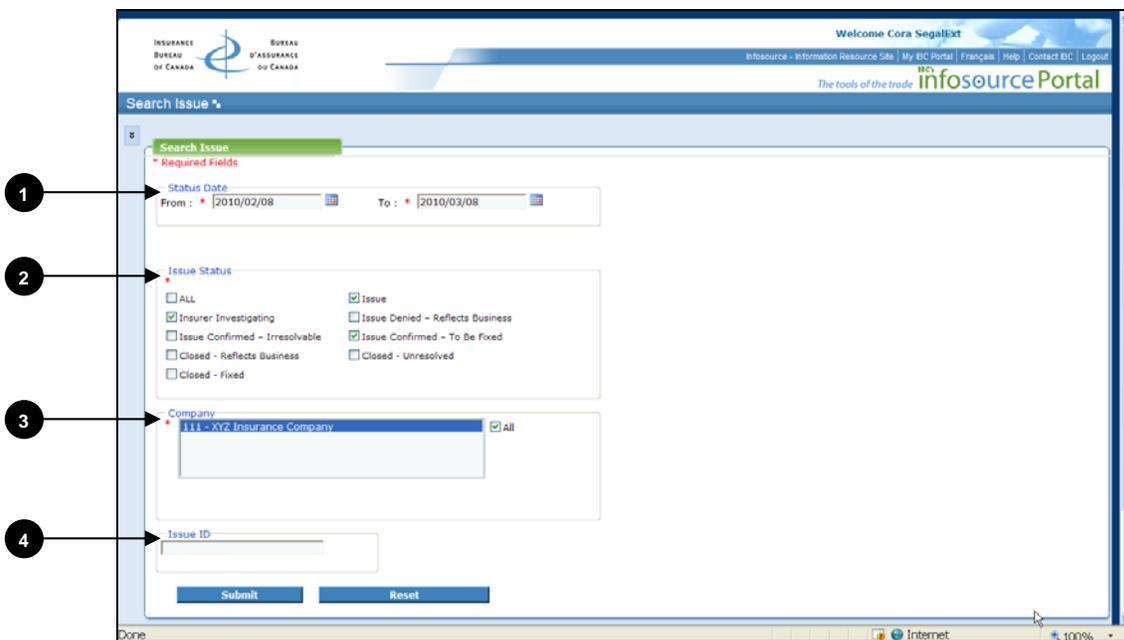
Apply this status when the investigation into the data issue uncovered a system problem but the data cannot be corrected and resubmitted. Provide a detailed explanation for why this is not possible. Once this status is set, IBC will review the details and will confirm or reject the status/explanation.

IMPORTANT NOTE: To avoid the unnecessary escalation of data issues and to avoid deficiency fee charges, please ensure that appropriate and timely action is taken to correct EWS data issues.

2.2. Entering Search Criteria

The Search Issue screen allows you to select data issues based on specific criteria. You can customize your search results by expanding or narrowing the selection criteria. Once you have chosen your criteria, you will click the SUBMIT button.

Table 1 describes the criteria and selection options that you find numbered in the screenshot below.



Search Issue – Selection Criteria

Table 1: Search Issue Selection Criteria

No.	Criteria	Description	Selection options
1	Status Date (Mandatory)	<p>“From” and “To” Status Date year (CCYY), month (MM), and day (DD)</p> <p>The Status Date refers to the date the current issue status was set</p>	<ul style="list-style-type: none"> - Defaults to the latest month - Enter the numeric representation of the year, month and day

No.	Criteria	Description	Selection options
2	Issue Status (Mandatory)	Select one or more of nine checkboxes: <ul style="list-style-type: none"> - ALL - Issue - Insurer Investigating - Issue Denied -Reflects Business - Issue Confirmed - Irresolvable - Issue Confirmed - To Be Fixed - Closed - Reflects Business - Closed - Unresolved - Closed - Fixed 	<ul style="list-style-type: none"> - Defaults to "Issue", "Insurer Investigating" and "Issue Confirmed - To Be Fixed" (i.e., the "Issue", "Insurer Investigating" and "Issue Confirmed - To Be Fixed" checkboxes are checked) - One or more Statuses can be selected - Check the "ALL" checkbox to select all issue statuses -
3	Company (Mandatory)	List of available reporting companies, based on your user profile	<ul style="list-style-type: none"> - Defaults to "All" (i.e., the "All" checkbox is checked) - One or more companies can be selected from the list
4	Issue ID (Optional)	The Issue ID is the unique number IBC assigns to each data issue in the Early Warning System	<ul style="list-style-type: none"> - No default

Click the RESET button to return all criteria fields to their default values.

2.3. Viewing and Selecting from Search Results

After you submit the “Search Issue” information, the Issue List screen will be displayed. The Issue List screen provides a list of all Early Warning System data issues that met your search criteria.

When the list is initially displayed, it will be sequenced by ID (Issue ID). However, you can change the order of the list by clicking any of the underlined column headings. A second click on a column heading will reverse the sequence.

Navigate through multiple pages by clicking the desired page number link at the bottom of the list.

Table 2 describes the information that you find numbered in the screenshot below.

The screenshot shows the 'Issue List' search results screen. At the top, there is a header with the Insurance Bureau of Canada logo and 'Welcome Cora Segal'sht'. Below the header, the search criteria are displayed: Status: Insurer Investigating, Date Range: 2010/02/15 to 2010/03/15, Company: 111, Issue ID: Not Selected. The main content is a table with columns: ID, Anomaly Rule ID, Current Status, Issue Date, Company, Plan(s), Kind(s), and Entry Date Range. The table contains 10 rows of data. At the bottom of the table, there is a page number '1 2' and a 'Return' button. Below the table is a 'System Messages' section. Numbered callouts 1 through 9 point to various elements: 1 points to the search criteria area, 2 points to the ID column header, 3 points to the Anomaly Rule ID column header, 4 points to the Current Status column header, 5 points to the Issue Date column header, 6 points to the Company column header, 7 points to the Plan(s) column header, 8 points to the Kind(s) column header, and 9 points to the Entry Date Range column header.

ID	Anomaly Rule ID	Current Status	Issue Date	Company	Plan(s)	Kind(s)	Entry Date Range
434	RCB699002	Insurer Investigating	2010/03/08	111	8	1	2009/08 - 2009/06
2883	BCP408001	Insurer Investigating	2010/02/25	111	8	1	2009/06 - 2009/06
6292	BCP699006	Issue	2010/03/15	111	8	1	2009/06 - 2009/06
6904	BCP621001	Issue	2010/03/15	111	8	1	2009/06 - 2009/06
6929	BCP699009	Issue	2010/03/15	111	8	1	2009/06 - 2009/06
6955	BCP621001	Issue	2010/03/15	111	8	1	2009/06 - 2009/06
6964	BCP622001	Issue	2010/03/15	111	8	1	2009/06 - 2009/06
6968	BCP624002	Issue	2010/03/15	111	8	1	2009/06 - 2009/06
6970	BCP624003	Issue	2010/03/15	111	8	1	2009/06 - 2009/06
7141	BCP604001	Issue	2010/03/15	111	8	1	2009/06 - 2009/06

Issue List Search Results Screen

Table 2: Issue List – Search Results Screen

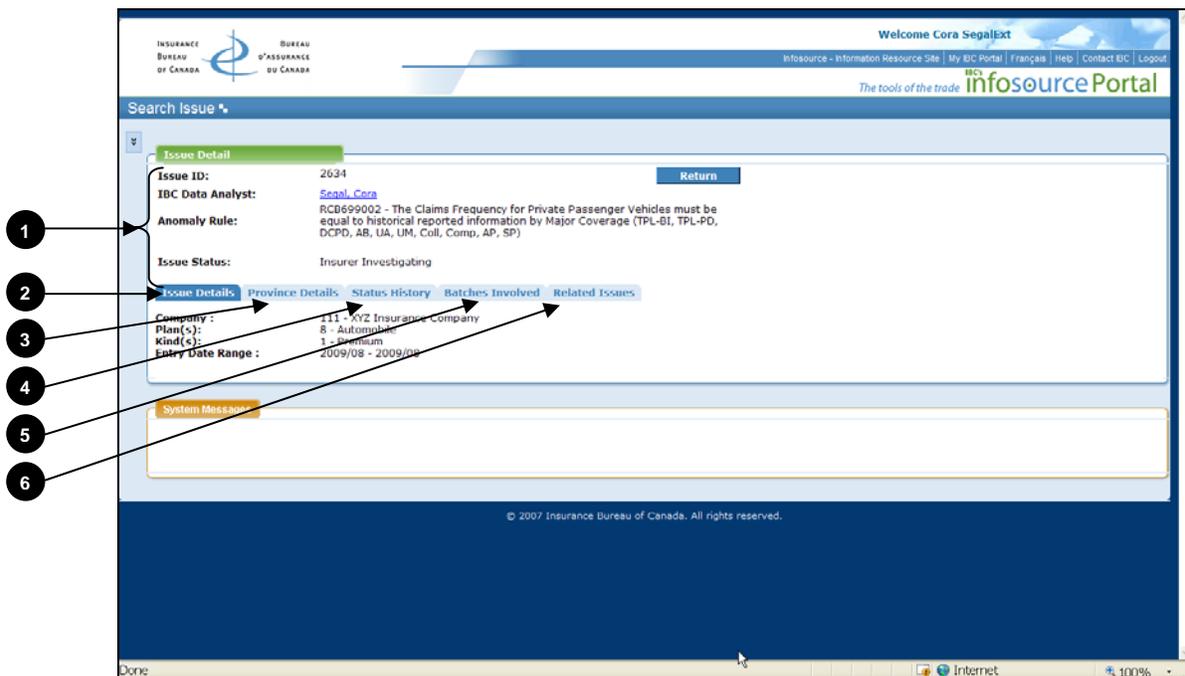
No.	Content	Description	Links
1	Search Criteria	A summary of the selection criteria is displayed in the top portion of the screen for your reference	- Display only
2	ID	The Issue ID is the unique number IBC assigns to each data issue in the Early Warning System	- The ID listed in the search results, links to the Issue Details screen where the issue details can be viewed and issue status can be updated
3	Anomaly Rule ID	The unique ID of the anomaly rule for which the data issue was detected	- Display only
4	Current Status	The current status of the data issue	- Display only
5	Issue Date	The date that the current status was set for the data issue	- Display only
6	Company	The reporting company number that the data issue was detected for	- Display only
7	Plan(s)	The statistical plan of the reporting company number that the data issue was detected for	- Display only
8	Kind(s)	The kind codes that the data issue was detected for	- Display only
9	Entry Date Range	The entry date range that the data issue was detected for	- Display only

At any point, click the RETURN button to return to the Search Issue screen and revise your selected criteria.

2.4. Viewing Issue Details

After you select an ID (Issue ID) from the Issue List, the Issue Detail screen will be displayed. This is where all of the data issue details are accessible and where updates to the issue statuses are made.

Table 3 describes the information that you find numbered in the screenshot below.



Issue Detail Screen

Table 3: Issue Detail Screen

No.	Content	Description	Links
1	General Information	General information regarding the data issue is displayed here, along with current issue status information, for your reference.	- Display only

No.	Content	Description	Links
2	Issue Details tab	Displays the Reporting Company, Plan(s), Kind(s) and Entry Date Range details for the selected data issue	- For a more detailed description, please see Issue Details Tab
3	Province Details tab	Displays the Province details for the selected data issue and provide access to view additional province details that may further refine the data problem at a provincial level.	- For a more detailed description, please see Province Details Tab
4	Status History tab	Displays the Status History details for the selected data issue and provide access to change the current issue status and add user comments	- For a more detailed description, please see Status History Tab
5	Batches Involved tab	Displays the Batch/Provinces details for the selected data issue and provide access to send an email request to the appropriate IBC Data Quality Analyst for reversal of the listed Batch/Provinces	- For a more detailed description, please see Batches Involved Tab
6	Related Issues tab	Displays a list of other EWS data issues which have been related to the issue currently being viewed. Clicking on a related Issue ID will open a separate window with the details of the selected related issue	- For a more detailed description, please see Related Issues Tab

A more detailed description of each of these Issue Detail screen areas is provided below.

Issue Details Tab

Click this tab to display the Reporting Company, Plan(s), Kind(s) and Entry Date Range details for the selected data issue. You cannot change this information.

Issue Details	Province Details	Status History	Batches Involved	Related Issues
Company :	111 - XYZ Insurance Company			
Plan(s):	8 - Automobile			
Kind(s):	1 - Premium			
Entry Date Range :	2009/08 - 2009/08			

Issue Detail Screen – Issue Details

Province Details Tab

Click this tab to display the Province details for the selected data issue. This includes the dollar amount, exposure/ claim count, and number of records for the provinces that are involved in the data issue. You cannot change this information.

View additional province details that may further refine the data problem at a provincial level by clicking on the View link.

Issue Details	Province Details	Status History	Batches Involved	Related Issues			
View Details	Province Code	Status	Status Date	Kind Code	Total \$ Amount	Total Expos/ Claim Count	Total # of Records
View	AB	Issue	2010/03/15 09:53:00	2	\$-8,016	3	78
View	NB	Issue	2010/03/15 09:53:00	2	\$0	0	9
View	NS	Issue	2010/03/15 09:53:00	2	\$8,217	3	27
View	ON	Issue	2010/03/15 09:53:00	2	\$-10,887	0	66
View	YK	Issue	2010/03/15 09:53:00	2	\$-4,500	0	9
					\$-15,186	6	189

Issue Detail Screen – Province Details

Refine Anomaly Province Detail			
Company : 111 - XYZ Insurance Company			
Plan(s) : 8 - Automobile			
Kind(s) : 2 - Paid Loss			
Entry Date Range : 2009/06 - 2009/06			
Province Code	Total \$ Amount	Total Expos/ Claim Count	Total # of Records
ON	-10887	0	66
Asp Field	From Value	To Value	
RO Gender	1		
Close			

Issue Detail Screen – Province Details – View Details Link

Status History Tab

Click this tab to display the Status History details for the selected data issue. This includes a list of the updates to the issue status, in descending order (most recent first), and the accompanying user comments.

Update the status for the provinces involved in the issue by clicking on the Update Status/Comments command button. Select the appropriate status and provide a detailed explanation and/or plan of action in the comments box.

Issue Details Province Details Status History Batches Involved Related Issues				
Status	Province(s)	Status Date	User	Comment
Insurer Investigating	ON	2010/03/08 14:15:15	SegalExt, Cora	Investigation into this issue is underway.
Issue	ON	2010/02/02 13:51:41	Collings, Courtney	The data reported does not follow the pattern of past reporting units.

Update Status/Comment

Issue Detail Screen – Status History

Update Status/Comment

Status

Province : * All

Comments : *

Add **Cancel**

Issue Detail Screen – Status History – Update Status/Comments Command Button

Batches Involved Tab

Click this tab to display the Batches Involved details for the selected data issue. This includes a list of the batches and provinces that contain one or many transactions that are involved in the data issue.

When you are prepared to resubmit the data involved in the data issue, click on the Send Reversal Request Email command button and an email communication can be prepared and sent directly to your DQA to request reversal of the listed batch/provinces. This email will automatically include the Issue ID and the list of batch/provinces in content of the email.

Issue Details	Province Details	Status History	Batches Involved	Related Issues
Batch Id	Province(s)			
1111111	AB,NB			
3333333	ON			
4444444	AB			
Send Reversal Request Email				

Issue Detail Screen – Batches Involved

Email Analyst

From: csegal@ibc.ca

To: csegal@ibc.ca

Subject: * Reversal Request - Issue ID : 2634 Company: 111 Entry Date: 2009/08-2009/08

*

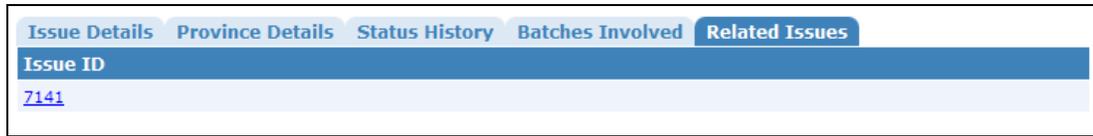
Issue ID : 2634 Company: 111 Entry Date: 2009/08-2009/08 Kind : 1Reversal Ba

Issue Detail Screen – Send Reversal Request Email

IMPORTANT NOTE: *The entire set of transactions for the reversed batch/province(s) must be resubmitted even if only a portion of the batch/province transactions are involved in the data issue. Also, corrections to errors may need to be reapplied.*

Related Issues Tab

Click this tab to display the Related Issue details for the selected data issue.
Clicking on a related Issue ID will open a separate window where the details of the selected related issue can be viewed.



Issue ID
7141

Issue Detail Screen – Related Issues

3. EWS –MANAGEMENT AND STATUS REPORTS

EWS – Management and Status Reports

Users can generate the following reports using EWS - Managements and Status Reports:

- Issue Volume Summary Report
- Issue Response Summary Report
- Issue Escalation Summary Report

These reports provide summarized information that will assist in monitoring the volume, the response and the escalation of data issues that have been communicated through the Early Warning System.

After successfully logging in to the application, you can access the Management and Status Reports module via the Main Menu. Once you select a report, the corresponding report criteria will be displayed.

To view a report, you must follow these steps:

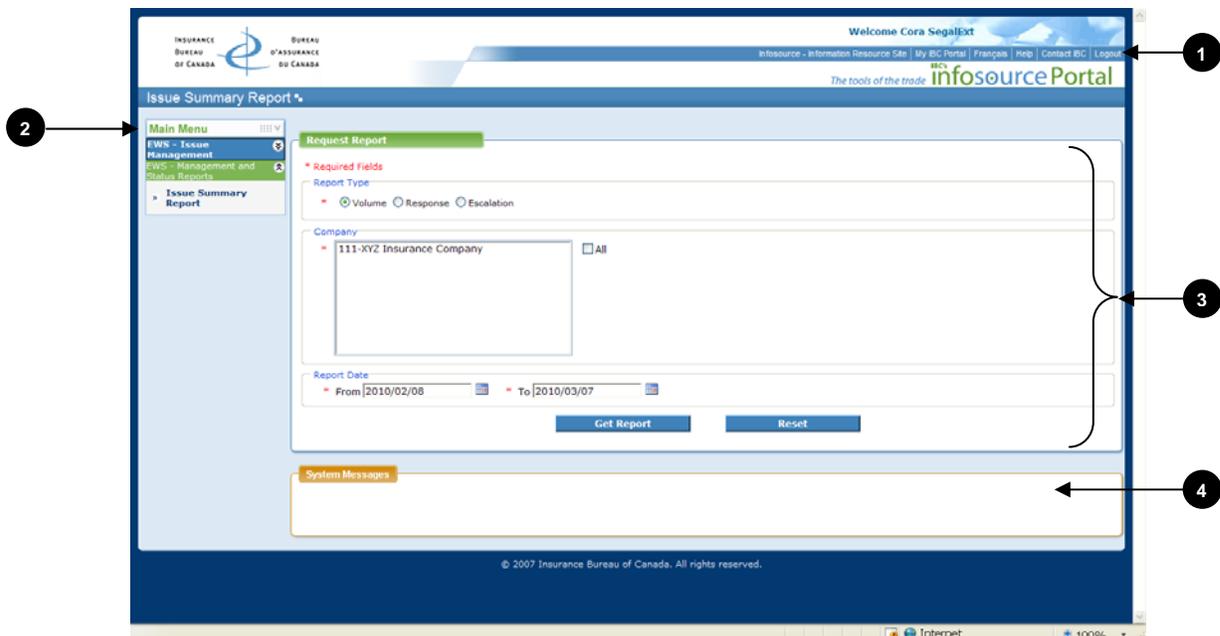
1. Choose a report type.
2. Select the desired criteria.
3. Generate the report.

To obtain access to the EWS - Management and Status Reports module, please see [Obtaining Access](#).

3.1. Common Report Features

The report screens are organized as follows (the numbers in the following list correspond to the numbers in the figure below):

- 1 Portal Menu The Portal Menu provides access to general application features. For example, this is where you can select a language preference and change your password.
- 2 Main Menu The Main Menu provides access to the modules within the Early Warning System application. Your ability to access specific modules is based on your individual user profile.
- 3 Report Window The Report Window is the area where you select report criteria and where reports are displayed.
- 4 Messages Window The Messages Window is where notices from IBC will be communicated, and where system messages and warnings will be displayed.



Areas of the Portal Screen

Portal Menu

The Portal Menu provides access to general application features. For example, this is where you can select a language preference and change your password. The following table describes each menu option:

Option	Description
Infosource - Information Resource Site	Provides access to Infosource, IBC's secure website.
My IBC Portal	Provides access to features that allow you to: <ul style="list-style-type: none"> - change your password; - set an answer to a question that IBC will use to verify your identity if you forget your password; and - view IBC's Security Statement.
Français	Enables you to switch your application language preference.
Help	Provides access to the Early Warning System User Guide.
Contact IBC	Provides IBC's contact information.
Logout	Enables you to log out of the application.

Main Menu

The Main Menu is located in the left portion of the screen. The Main Menu provides access to the modules (e.g., EWS - Issue Management, etc.) within the Early Warning System application. Your ability to access specific modules is based on your individual user profile.

To select a report from the Main Menu, expand the module you wish to use by clicking on the corresponding  icon. You will then be able to view all of the available reports and select the report you wish to access.



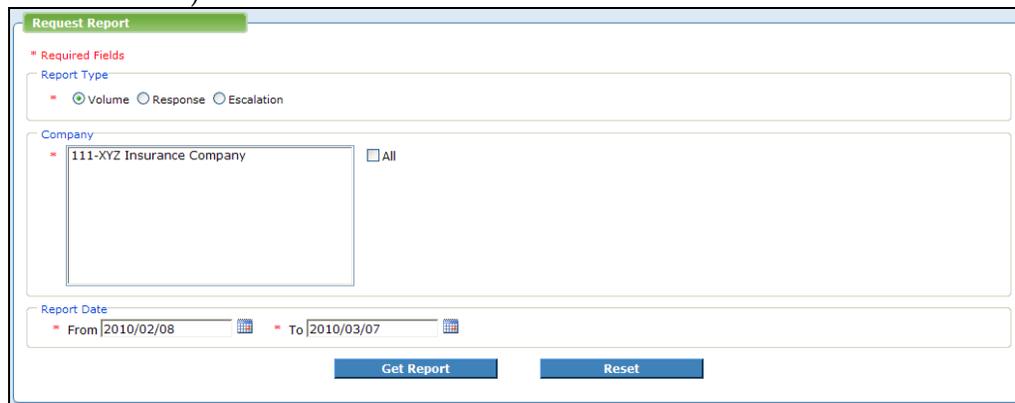
Report Window

The Report Window occupies the main portion of the screen. This is the area where you select report criteria and where reports are displayed.

Request Report Screens

There is a custom Request Report screen for each report. When you select a report from the Main Menu, the corresponding report criteria will be displayed in a Request Report screen.

(Note that clicking the RESET button will return the criteria fields to their default values.)



The screenshot shows a web-based form titled "Request Report". At the top, there is a green header bar with the text "Request Report". Below the header, there is a red asterisk followed by the text "Required Fields". The form is divided into three main sections: "Report Type", "Company", and "Report Date".

- Report Type:** This section contains three radio buttons: "Volume" (which is selected), "Response", and "Escalation".
- Company:** This section contains a text input field with the value "111-XYZ Insurance Company" and a checkbox labeled "All".
- Report Date:** This section contains two date pickers. The "From" date is "2010/02/08" and the "To" date is "2010/03/07".

At the bottom of the form, there are two blue buttons: "Get Report" and "Reset".

Request Report Screen

To generate a report, select the criteria you wish to include in the report and click the GET REPORT button.

The criteria you specify will be validated when you click the GET REPORT button. Any error messages will be displayed at the top of the Request Report screen. If you get an error message, you must revise and resubmit the criteria you selected. See a sample error message in the figure below.

Request Report

* Required Fields

- Company is a mandatory field.

Report Type

Volume Response Escalation

Company

111-XYZ Insurance Company All

Report Date

From 2010/02/08 To 2010/03/07

Get Report Reset

Error Message Appearing at the Top of the Request Report Screen

View Report Screens

After you submit your criteria, the report will be generated based on that criteria and the Report screen will replace the Request Report screen.

To generate a different report, choose the appropriate report name from the Main Menu.

View Report

1 of 1 100% Find | Next Select a format Export

INSURANCE BUREAU OF CANADA BUREAU D'ASSURANCE DU CANADA

Issue Volume Summary Report

Company Issue Contact:
 Company: 111 - XYZ Insurance Company
 Report Date Range: 2010/02/08 to 2010/03/07

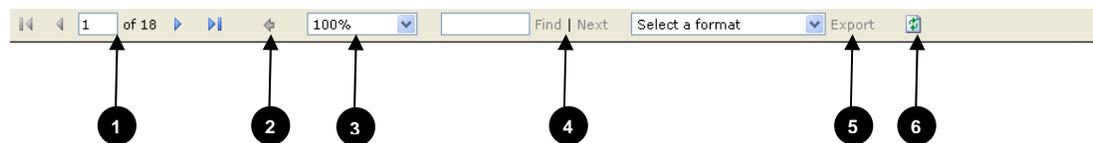
Numbers as of Calendar Date	Number of Outstanding Issues by Status			
	Totals	Issue	Insurer Investigating	Issue Confirmed To Be Fixed
2010/02	5	4	1	0
2010/02/14	6	6	0	0
2010/02/21	5	5	0	0
2010/02/28	5	4	1	0
2010/03	5	4	1	0

Page 1 of 1

View Report Screen

All of the reports have a standard View Report toolbar with the following capabilities (the numbers in the following list correspond to the numbers in the figure below):

- 1 Navigating within a report
- 2 Navigating back to a parent report (Not applicable to EWS)
- 3 Changing the report display
- 4 Searching within a report
- 5 Exporting and printing a report
- 6 Refreshing a report



Navigating Within a Report



The View Report toolbar (pictured above) includes a variety of page navigation functions. You can navigate to a specific page by entering a page number and hitting the ENTER button on your keyboard, or navigate directly to the first or last page of a multi-page report using the arrow buttons on the View Report toolbar. (Note that page breaks are explicitly defined by the report itself and cannot be changed.)

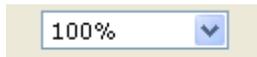
When navigating multi-page reports, you must use the “back” arrow button on the View Report toolbar to view previous pages. Do not use the “back” button on the Internet Explorer toolbar. If you use the “back” button on the Explorer toolbar, the navigation is unpredictable and an error may occur.

Navigating Back to a Parent Report



To get back to a parent report, use the button pictured above, located on the View Report toolbar. (Not applicable to EWS.)

Changing the Report Display



The View Report toolbar provides a standard zoom functionality (pictured above) that lets users zoom in on or out of a report, making the text larger or smaller.

Searching Within a Report



The View Report toolbar includes a search field (pictured above) to help you find specific text within a report. Search for content in a report by typing a word or phrase and clicking FIND. To search for subsequent occurrences of the same word or phrase, click NEXT.

Note that the search is not case-sensitive and begins at the top of the page or section that is currently selected. Wildcards and Boolean search operators are not supported.

Exporting and Printing a Report



Exporting

The View Report toolbar also allows you to export a report as a PDF file (pictured above). An XML export format is also available to support future technology capabilities.

Be aware that, depending on how the items in a report are aligned, the report layout in the PDF might include extra pages or white space that you did not expect.

Printing

To print a report, export it to a PDF file and then print the report by selecting "Print" from the "File" menu.

Refreshing a Report



To refresh a report, click the REFRESH button (pictured above). The report server will then reprocess the report using the most recent data.

3.2. Issue Summary Reports

About the Report

The Issue Summary Report provides access to the three reports that provide summarized information regarding the volume, response and escalation of data issues that have been communicated through the Early Warning System.

You can access these reports by selecting the Issue Summary Report option under EWS – Management and Status Reports in the Main Menu.

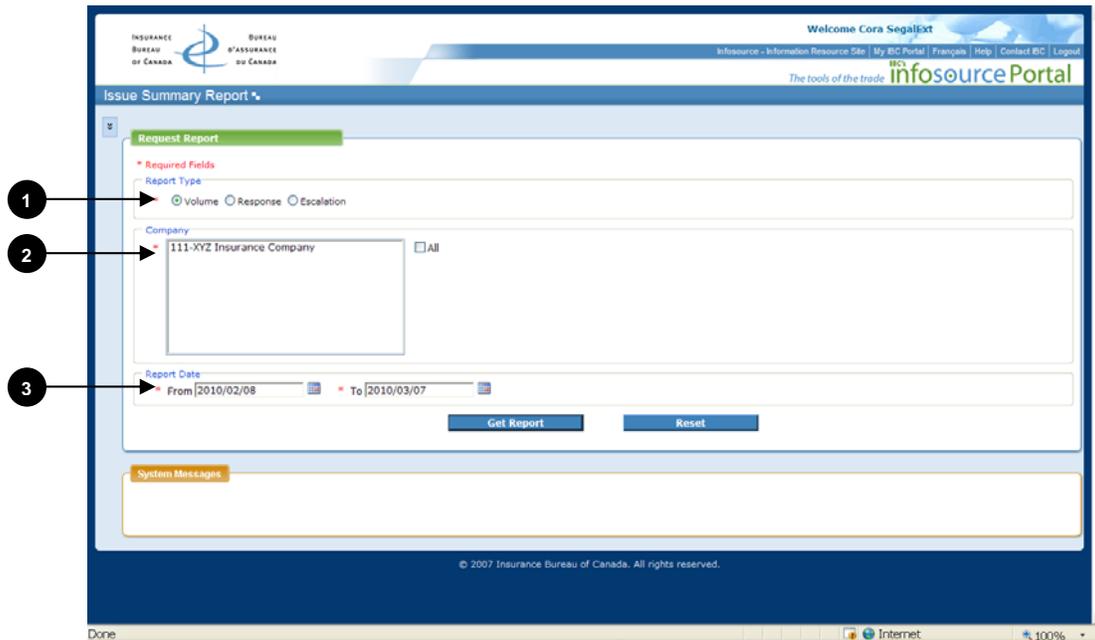
Entering Selection Criteria

You can customize the report results by expanding or narrowing the selection criteria and clicking the GET REPORT button.

In the Report Type section near the top of the Report Criteria screen for this report, you must choose from one of three report types. The report type options are:

1. Volume
2. Response
3. Escalation

Table 4 describes the criteria and selection options that you find numbered in the screenshot below.



Issue Summary Report – Entering Selection Criteria

Table 4: Issue Summary Report – Entering Selection Criteria

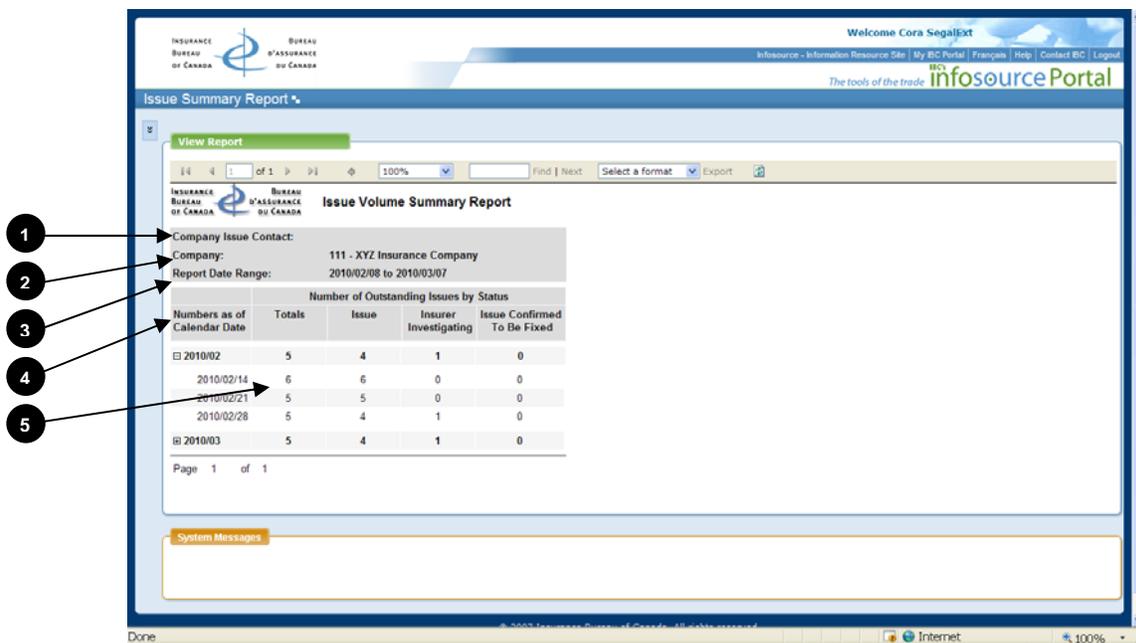
No.	Criteria	Description	Selection options
1	Report Type (Mandatory)	Choose from three report types: 1. Volume 2. Response 3. Escalation	- Defaults to “Volume”
2	Company (Mandatory)	List of available reporting companies based on user’s profile	- No default value - At least one company number must be selected - Check the “All” checkbox to select all companies in the list
3	Report Date (Mandatory)	“From” and “To” Status Date year (CCYY), month (MM), and day (DD) Report date refers to the desired time frame for the report information	- Defaults to the latest month - Enter the numeric representation of the year, month and day

Click the RESET button to return all criteria fields to their default values.

Viewing Report Details – Issue Volume Summary Report

After you submit the criteria you have selected for the Volume report type, the Issue Volume Summary Report will be displayed. The Issue Volume Summary Report shows the weekly volume of issues by individual issue statuses. This report is useful in monitoring the changes to the volume of issues from week to week.

Table 5 describes the headings you find numbered in the screenshot below.



Issue Volume Summary Report – Viewing Report Details

Table 5: Issue Volume Summary Report – Viewing Report Details

No.	Content	Description	Links
1	Company Issue Contact	The designated Company Issue Coordinator for Early Warning System issues	- Display only
2	Company	As selected	- Display only
3	Report Date Range	As selected	- Display only

No.	Content	Description	Links
4	Numbers as of Calendar Date	Monthly summary can be expanded to show the number of outstanding issues at the end of each week (week ending Sunday) by clicking on the corresponding  icon.	- Display only
5	Number of Outstanding Issues by Status	Summarized count of the issues by status at the end of each month and at the end of each week (week ending Sunday)	- Display only

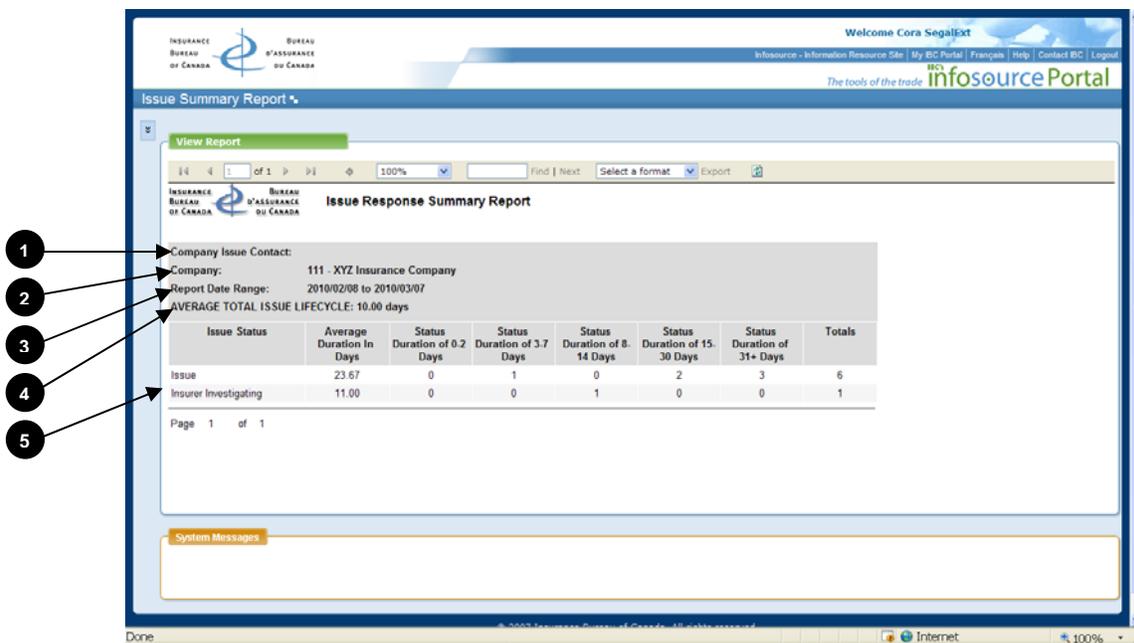
See Also:

- [Navigating within a report](#)
- [Navigating back to a parent report](#)
- [Changing the report display](#)
- [Searching within a report](#)
- [Exporting and printing a report](#)
- [Refreshing a report](#)

Viewing Report Details – Issue Response Summary Report

After you submit the criteria you have selected for the Response report type, the Issue Response Summary Report will be displayed. The Issue Response Summary Report shows the duration of issue statuses. This report is useful in monitoring the response time received on issues.

Table 6 describes the headings you find numbered in the screenshot below.



Issue Response Summary Report – Viewing Report Details

Table 6: Issue Response Summary Report – Viewing Report Details

No.	Content	Description	Links
1	Company Issue Contact	The designated Company Issue Coordinator for Early Warning System issues	- Display only
2	Company	As selected	- Display only
3	Report Date Range	As selected	- Display only

No.	Content	Description	Links
4	Average Total Anomaly Lifecycle	The average lifecycle for the resolved issues that existed for the selected report date range	- Display only
5	Status Duration by Issue Status	The count of issues summarized by the duration of the individual issue statuses that existed for the selected report date range	- Display only

See Also:

[Navigating within a report](#)

[Navigating back to a parent report](#)

[Changing the report display](#)

[Searching within a report](#)

[Exporting and printing a report](#)

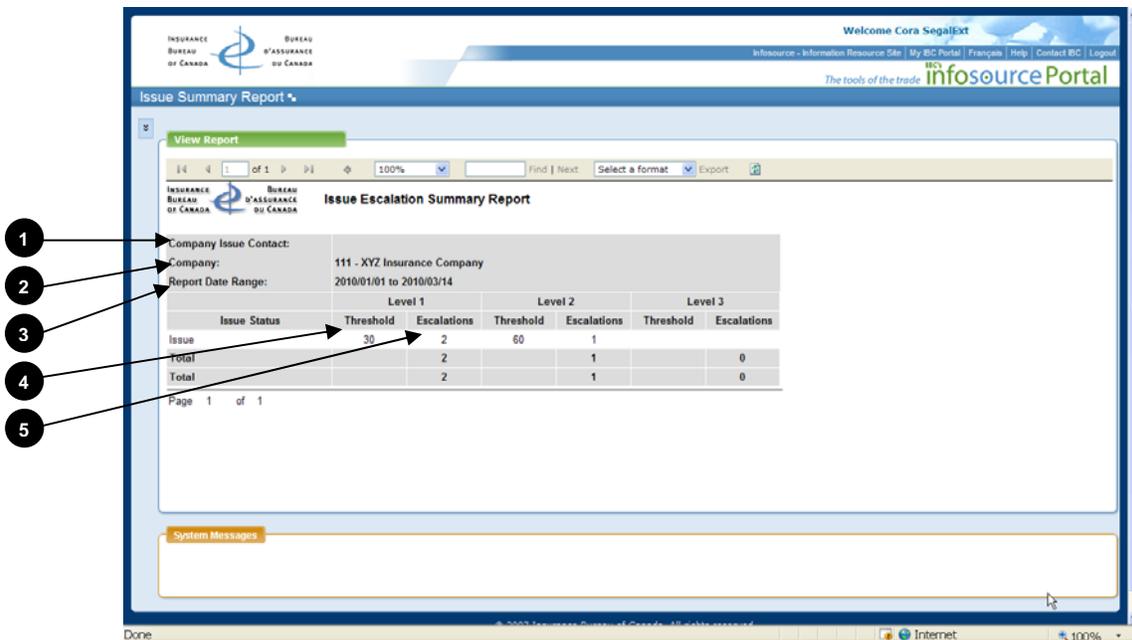
[Refreshing a report](#)

Viewing Report Details – Issue Escalation Summary Report

After you submit the criteria you have selected for the Escalation report type, the Issue Escalation Summary Report will be displayed. The Issue Escalation Summary Report shows the number of issues that have been escalated, by status and escalation level.

IMPORTANT NOTE: *To avoid the unnecessary escalation of data issues and to avoid deficiency fees charges, please ensure that appropriate and timely action is taken to correct EWS data issues.*

Table 7 describes the headings you find numbered in the screenshot below.



Issue Escalation Summary Report – Viewing Report Details

Table 7: Issue Escalation Summary Report – Viewing Report Details

No.	Content	Description	Links
1	Company Issue Contact	The designated contact for Early Warning System issues	- Display only
2	Company	As selected	- Display only

No.	Content	Description	Links
3	Report Date Range	As selected	- Display only
4	Level x Threshold by Issue Status	The number of days after which an issue will be escalated if no action has been taken	- Display only
5	Level x Escalations by Issue Status	The number of issues that have been escalated, by issue status and escalation level	- Display only

See Also:

[Navigating within a report](#)

[Navigating back to a parent report](#)

[Changing the report display](#)

[Searching within a report](#)

[Exporting and printing a report](#)

[Refreshing a report](#)

4. CONTACTING IBC FOR SUPPORT

IBC is committed to providing superior customer service. We provide full support to our clients through our various support teams:

- Data Quality Management
- Helpdesk
- Member Services

Your primary point of contact is the Data Quality Management Team, through your Data Quality Analyst (DQA) who can be reached by phone at 416-362-2031, ext 4605 or 1-800-761-6703, ext 4371 or by e-mail to dataquality@ibc.ca.

For further information, visit IBC's website at www.IBC.ca.

APPENDIX A – ISSUE STATUS DESCRIPTIONS

The following are the descriptions of the possible issue statuses:

Status	Description of Status
Issue	Issue status is set by IBC when a detected data problem requires investigation by the reporting company.
Insurer Investigating	Set this status to indicate that investigation of the data issue is underway.
Issue Denied – Reflects Business	Set this status when the investigation into the data issue determined that the data does in fact reflect your business and provide a detailed explanation in the comments box. Once this status is set, IBC will review the details and will confirm or reject the status/explanation.
Issue Confirmed – Irresolvable	Apply this status when the investigation into the data issue uncovered a system problem but the data cannot be corrected and resubmitted. Provide a detailed explanation for why this is not possible. Once this status is set, IBC will review the details and will confirm or reject the status/explanation.
Issue Confirmed – To Be Fixed	Apply this status when the investigation into the data issue uncovered a system problem that will be fixed and the ASP data will be resubmitted. Once this status is set, IBC will monitor to ensure the timely receipt of the data resubmission. Use the reversal option to request the reversal of the existing batches when the data resubmission is ready (please see Batches Involved Tab for further information on requesting a reversal).
Closed – Reflects Business	This status is set by IBC to confirm the status/explanation provided, when the investigation into the data issue determined that the data does in fact reflect your business.

Status	Description of Status
Closed - Unresolved	This status is set by IBC to confirm the status/explanation provided, when the investigation into the data issue uncovered a system problem but the data cannot be corrected and resubmitted.
Closed - Fixed	This status is set by IBC to confirm that the data issue has been resolved, when the investigation into the data issue uncovered a system problem that was fixed and the corrected ASP data has been resubmitted and processed by IBC.